

8-18-2018

Documentation for Team Processing: A Strategy for Internal and External Transparency

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Documentation for Team Processing

A Strategy for Internal and External
Transparency



Outline

1. Processing: Lone Arranger vs. Team
2. Transparency in Processing
3. Documentation Workflow
4. Conclusion



Processing: Lone Arranger vs Team





Processing: Lone Arranger vs Team



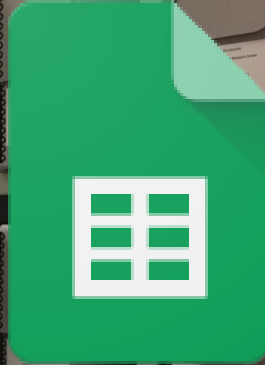


Frank Harmon Papers





Frank Harmon Papers



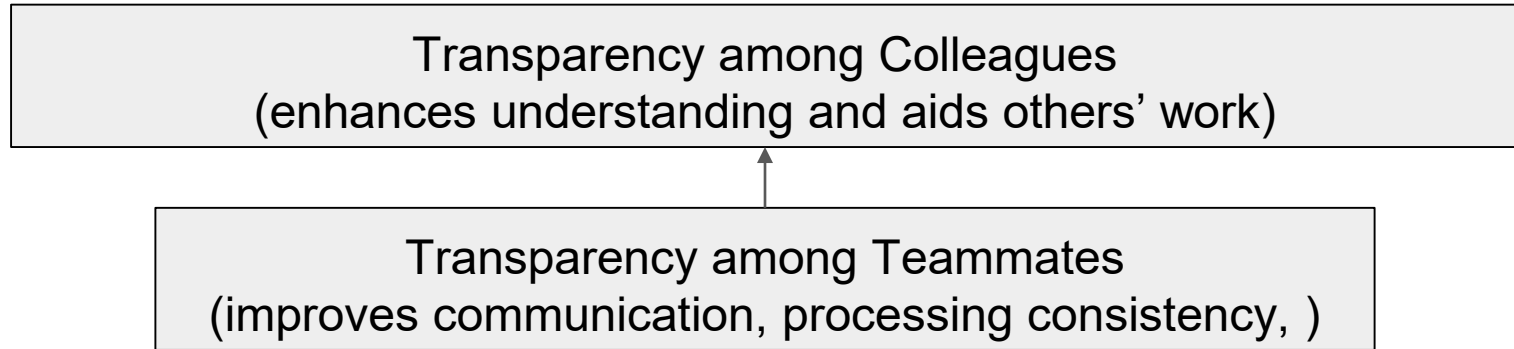


Multi-Levels of Transparency in Processing

Transparency among Teammates
(improves communication, processing consistency,)

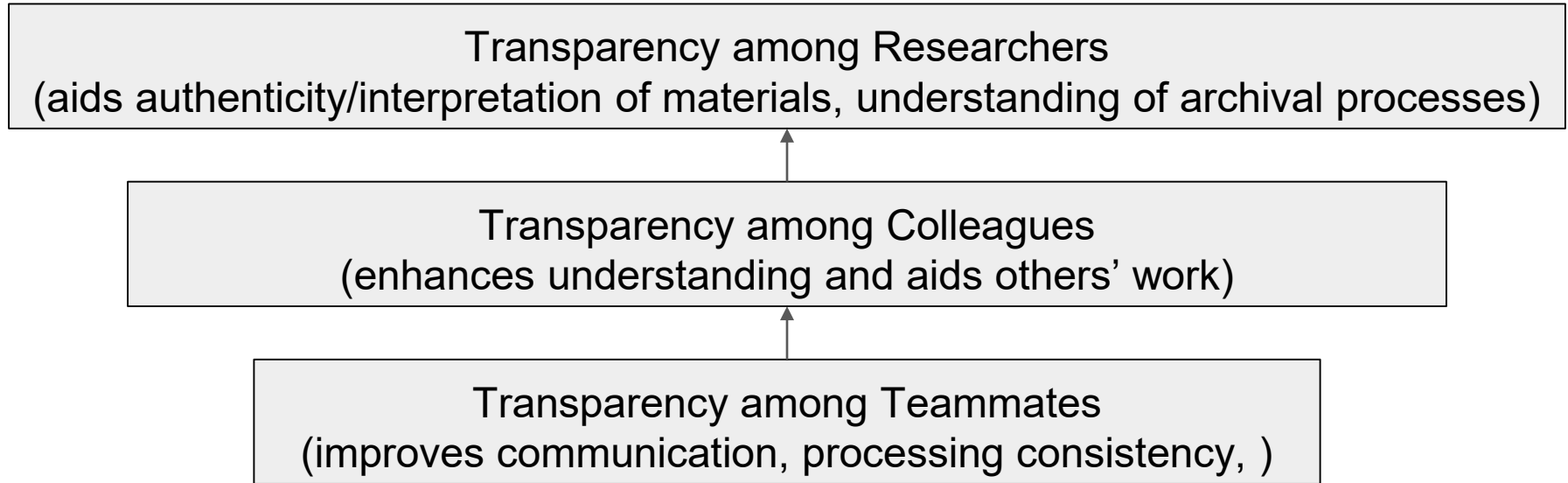


Multi-Levels of Transparency in Processing





Multi-Levels of Transparency in Processing





Frances Richardson Papers

	B	C	D	E	F	G	H
1	Research Files	Teaching & Advising Files	School of Engineering Files	North Carolina State University Files	Professional Activities Files	Sigma Xi Files	Society of Women Engineers (SWE) Files
2	notebooks	teaching materials	Engineering Research dept. reports	NCSU general/admin	lectures	all things Sigma Xi	National SWE
3	proposals	student career recruitment	Engineering Research News publications	university publications	conferences		NC SWE
4	publications related to her research	student recommendations		staff evaluations	publications related to professional work		NCSU SWE
5	reports	advising/theses		university committees/orgs			
6	Case-Western materials	student job placement materials		university meetings			
7	science-related articles (not directly related to her own research) - address these in later processing stage			university programs/conferences			
8	course notes for classes taken at NCSU to advance her research	*pull out all items with SSNs/grades		women's issues			
9							
10							
11	<u>Sub-categories:</u>	<u>Sub-categories:</u>	<u>Sub-categories:</u>	<u>Sub-categories:</u>	<u>Sub-categories:</u>		<u>Sub-categories:</u>
12							
13	Topical research	Course Materials	Biological & Agricultural Engineering (BAE)	Library	Organizations		North Carolina State University student section
14	Research projects	Advising Materials	Biomedical Engineering (includes BMEGM, BMEGMF, Biomedical Engineering Interest Group)	Faculty Senate	Events		
15	Reports		Engineering Operations Program (EOP)	Preprofessional Health			
16	Proposals		Student Recruitment				
17			Chemical Engineering				
18			Engineering Research Department				
19							
20	5.5 cartons	2.5 cartons	8 cartons	~2 cartons	~2 cartons	2 cartons	2 cartons
21							
22	16 boxes	5.5 boxes	12 boxes	6.5 boxes	5 boxes	2 boxes	4.5 boxes
23	2 legal boxes	1 legal box	3 legal boxes	1 legal box	0.75 legal boxes	0.25 legal boxes	0.5 legal boxes
24			1 reel box				
25							
26							
27	9.5 linear feet	3.5 linear feet	8.55 linear feet	4 linear feet	3.0625 linear feet	1.1875 linear feet	2.625 linear feet
28							
29							
30							
31							
+ [] Container List Series Biog/Hist Timeline Born-Digital []							

Frances Richardson Papers - Biographical Timeline

	A	B	C	D
1	Billie Richardson Timeline			Areas of Research / Career Work
2				
3	Born Roanoke, VA	6 May 1922		Field of specialization: Chemical and Biomedical Engineering
4	BS in Chemistry, Roanoke College	1939 - June 1943		Came to NCSU because they were building the first nuclear reactor constructed outside the Atomic Energy Commission facilities
5	Chemist, DuPont, Rayon Division, Richmond, VA	1943 - 1945		Presented her research at the first Geneva conference on the use of atomic energy (ca. 1961)
6	Grad Assistant, Department of Chemistry, University of Cincinnati	1945 - 1947		Rheology (science of the flow of materials) - radioisotope techniques for tracing the flow of non-Newtonian fluids, using radioactive tracer d
7	MS in Chemistry, University of Cincinnati	June 1947		Worked with Soo Young Choi and John C. Randall on their theses related to Billie's research
8	Research Chemist, Leas and McVitty, Salem, VA	1948 - 1949		Rheology is important to the engineering of space crafts (fundamental properties of the flow of gases and liquids)
9	Graduate study, Columbia University	June 1949 - 1951		
10	Research Associate, Department of Engineering Research, NCSU	1951 - 1960		Focus at Case Western was creating models of the lung system to study airway dynamics (1967-68)
11	Served on Radiation Committee (oversaw use of radioactive substances at NCSU)	1951 - 1959		Application of engineering techniques to the study of respiratory physiology (as of 1969)
12	Oak Ridge Institute of Nuclear Studies Radioisotope Techniques School	March - April 1952		Fluid mechanics and infrared imaging thermography - thermography research began in early 1970s, collaborated with Beatty (process for r
13	Research Associate Professor, Department of Engineering Research, NCSU	1960 - 1979		Transfer thermography had potential uses in medical applications
14	Secretary, NCSU Chapter of Sigma Xi	1963 - 1964		Developed cross-disciplinary courses and research in the area of respiratory airway dynamics (biomedical engineering)
15	Treasurer, NCSU Chapter of Sigma Xi	1964 - 1965		
16	Vice-President, NCSU Chapter of Sigma Xi	1965 - 1966		Guided activities of grad students pursuing advanced degrees (as of 1969)
17	Program Chairman, NCSU Chapter of Sigma Xi	1966 - 1967		Founded and advised student chapter of SWE (chartered 1976)
18	Major change in Dep. of Chemical Engineering, Richardson was alienated from her 16 years of work, returned to Engineering Research & decided to change focus to medical field	1967		Founded and advised the American Society for Engineering Management
19	Visiting Associate Professor of Biomedical Engineering, Case Western Reserve University	1967 - 1968		Co-advised the Biomedical Engineering Society
20	Dept. of Engineering Research transformed into a section of the Office of the Dean (of the School of Engineering)	1979		Administered 3 degree-granting programs: Engineering Operations, BS Engineering, College of Engineering Professional Degree Program
21	President, NC Section of Society of Women Engineers	1979		Faculty governance activities - Faculty Senate service (grievance resolution)
22	Richardson's administrative duties increased - took over student advising for engineering operations	~1979		Biological and Agricultural Engineering Department - development of courses and projects in biological and biomedical engineering
23	Research Associate Professor, Engineering Research, Office of the Dean, School of Engineering, NCSU	1979 - 1980		
24	Associate Director, Engineering Operations Program	1980 - 1983		
25	Engineering Operation Department closes	1983		
26	Associate Professor, Office of the Dean, School of Engineering, NCSU	1983 - 1993?		
27	Chairman, Advisory Council on Women's Affairs (her and group of women founded the council to address concerns of women students, staff, faculty)	January 1984		
28	Retired	1993		
29				
30				
31				
32				



Frances Richardson Papers - Born Digital

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Box	Folder	Format	Title											
2	26	15. Biomedical Engineering: BMEGM proposal revisions	3.5" IBM Diskette	disk is not labeled											
3															
4															
5															
6															
7															
8															
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Container List ▾

Series ▾

Biog/Hist Timeline ▾

Born-Digital ▾

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Gregory Lewbart Papers

	A	B	C	D	E	F	G	H
1	1. Clinical and Research Files	2. Professional Files	3. College of Veterinary Medicine Files					
2	Medical records	Organizations	NCSU papers					
3	Hospital administration	Events (conferences, workshops, symposia, natural disasters, educational outreach/continuing ed courses taught outside NCSU)	Tenure and review					
4	Pathology reports	Manuscript submissions (books/chapters/manuscript publishing info) [<-- this subcategory is not necessarily the actual publication, but correspondence about the publishing of the work or materials used to write the work]	Facilities					
5	Clinical case files	Manuscript reviews	Teaching files					
6	Research files	Manuscript editor files	Student activities (research, papers, student orgs., etc.)					
7	Experiments	Employment opportunities (job applications and company recruitment materials)	Committees					
8	Project files		Awards					
9			Events					
10								
11								
12	Sub-categories:	Sub-categories:	Sub-categories:					
13	Clinical cases	Employment opportunities	Awards					
14	Consultations	Events	Committees					
15	Equipment	Manuscript editor files	Events					
16	Projects	Manuscript submissions	Facilities					
17		Organizations	Student activities					
18			Teaching files					
19			Tenure and review					
20								
21								
22								
23								
24								
25								
26								
27								
28	<u>Linear feet:</u>	<u>Linear feet:</u>	<u>Linear feet:</u>	<u>Linear feet:</u>				
29	2.5 cartons	2 cartons	4 cartons					
30	7 boxes	7 boxes	4 boxes	18 boxes				
31	.33 legal boxes	.33 legal boxes	.33 legal boxes	1 legal box				
32								

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Series ▾

Bio/Hist notes ▾

Acronyms ▾

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Gregory Lewbart Papers - Acronyms

	A	B
1	Acronym	Spelled out
2	AAWV	American Association of Wildlife Veterinarians
3	AAZV	American Association of Zoo Veterinarians
4	ACLAM	American College of Laboratory Animal Medicine
5	ACVC	Atlantic Coast Veterinary Conference
6	ACZM	American College of Zoological Medicine
7	AKCA	Associated Koi Club of America
8	ARAV	Association of Reptilian and Amphibian Veterinarians
9	AVMA	American Veterinary Medical Association
10	CASS	Companion Animal and Special Species (medicine)
11	CVC	Central Veterinary Conference
12	IAAAM	International Association for Aquatic Animal Medicine
13	JZWM	Journal of Zoo and Wildlife Medicine
14	NAG	Nutrition Advisory Group
15	NAVC	North American Veterinary Conference
16	NAVLE	North American Veterinary Licensing Exam
17	NWRA	National Wildlife Rehabilitators Association
18	PVMA	Pennsylvania Veterinary Medical Association
19	TSA	Turtle Survival Alliance
20	USDA APHIS	USDA Animal and Plant Health Inspection Service
21	VTH	Veterinary Teaching Hospital
22	WAAZM	Wildlife Avian Aquatic Zoo Medicine (club)
23	WRNC	Wildlife Rehabilitators of North Carolina
24		
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33		

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Series ▾

Bio/Hist notes ▾

Acronyms ▾



Frank Harmon Papers

	A	B	C	D	E	F	G	H
1	Existing series:	<u>Project Files</u> (Project Records?)	<u>Drawings</u>	<u>Photographs and Slides</u>	<u>Models</u>	Office Files	<u>Article Files</u> (Public Relations?)	<u>Web Content</u>
2	Types of contents:	cartons	tubes	about 2 dozen cartons	cartons		2 cartons	1 digital object (7.3MB, 224 files)
3		boxes	flat folders		flat boxes			
4		legal boxes			oversize boxes			
5					half boxes			
6					boxes			
7								
8								
9								
10								
11								
12								
13	Online finding aid survey observations:	cartons are described at container level, boxes at folder level but use a lot of acronyms	almost all capitalized for some reason?	not much description at all—photographs and slides	residential models, container level description		about his publications?, can we combine this with project files? Shepherd/Lowell suggests Public Relations could be a subseries under Office Records series "used to describe activities that disseminate information about the firm" (p. 7). Does this hierarchy work for us?	tumblr web archive? keep this here as separate series?
14	Plans:	There may be projects the firm didn't end up building, but they still documented the initial competition for the job and client contact. Add a note in the scope explaining some projects were not taken on by Harmon's firm.	Looks like we can probably keep description, may need to rehouse some original tubes, and add locations and dates?					
15				Can we put born digital here since tumblr is AV heavy, and rename this series AV Materials.				
16								
17								
18								
19							chronological?	
20								
21								

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Series ▾

Blog/Hist Notes ▾

Controlled Vocab & Formatting ▾

Acronyms ▾

Born-Digital ▾

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Frank Harmon Papers - Controlled Vocabulary

	A	B	C	D	E
1	Controlled Vocab for Content Descriptions	Decisions			
2	Billing	Arrange alphabetically			
3	Budget	Create sub-series for any project with 3 or more folders.			
4	Planning	Place projects with less than 3 folders in "Additional Projects" sub-series.			
5	Specifications				
6		In ASpace: Add street address as General Note			
7		In ASpace: add location in Subject field			
8		In ASpace: Add project number in component unique ID field			
9					
10		Project index (Ex. Lewis Clarke and Marvin Malecha), create an other finding aid note and link to a pdf or spreadsheet.			
11		Environmental Design Archives at Berkley as example of project index.			
12		*Get book from Hill on managing architectural collections			
13					
14					
15	Folder Title Format				
16	Project title (project no #####), further content description, address [if known], location by city [ex. Raleigh, N.C.], date				
17					
18	Spell out names [Smith, Jane A.]				
19	Include street addresses if found.				
20	For sub-series, write address and project no. on series line only for first folder.				
21		How to title correspondence relating to specific things? Ex. budgeting correspondence - do we want it alphabetical with budget (Title: Budget correspondence) or with correspondence (Title: Correspondence about budget, or Correspondence, budget)? I feel like we are emphasizing the activity more so than correspondence in this series.			
22					
23		What if there are multiple "projects" for one company/building? Farm Bureau had renovations as well as multiple additions. Should these each be their own project with a separate series title? It looks like Harmon mixed the projects together in his filing. For example, a hanging folder titled Contracts & Billing contain folders for both renovations and additions. This may prove too much work to separate them out by project.			
24					
25					
26					
27					
28					
29					

Series ▾

Blog/Hist Notes ▾

Controlled Vocab & Formatting ▾

Acronyms ▾

Born-Digital ▾

Frank Harmon Papers - Project Titles

	A	B	C	D	E	F	G	H	I	J	K	L
1	Subseries	Additional Projects	Project Title	Project Number	Street Address	City	State	Date Range for Project Files	Project Files Series	Drawings Series	Photographs Series	Models Series
2			6800 Glenwood Avenue Mark Abrams (PPA)	9204								
3		X	Adams residence deck					1993	box 133			
4	X		African American Cultural Complex	9814	119 Sunnybrook Road	Raleigh	North Carolina	1997-2000	box 1	tubes 35, 255, 294		
5			American Institute of Architects North Carolina headquarters	0801	14 East Peace Street	Raleigh	North Carolina			flat folders 35, 36, 37		X
6		X	Anderson Grove Preschool and Infant Care Center	9408	1920 Woodhurst Avenue	Albemarle	North Carolina	1986-1991, 2002	box 133	tubes 276, 295, 91, 296, 297, 282, 298; flat folders 28, 40, 50	box 158	
7			Atlantic Christian College			Wilson	North Carolina				box 158	
8			Auger residence	9822						tubes 244, 359; flat folder 59		
9		X	Baker, Debora and Steve residence			Charleston	South Carolina	2003	box 133			
10		X	Bangs, Hoyt residence renovation		3039 Churchill Road	Raleigh	North Carolina	1988	box 133		box 158	
11			Barnard residence	9614						tubes 240, 316		
12	X		Barringer guest house	0208	490 Barringer Road	Sanford	North Carolina	2002	box 1	tubes 93, 300, 301, 302		
13			Beach house addition	0707	3101 Point Street	Edisto Beach	South Carolina					
14		X	Beckmann, Anna and Uwe residence	9909	604 Caswell Road	Chapel Hill	North Carolina	1999	box 134			
15		X	Bell, Ann and John residence		11701 Norwood Road	Raleigh	North Carolina	undated	box 134			
16		X	Blatecky, Alan and Gene residence		12721 Boyce Mill Road	Raleigh	North Carolina	2003-2004	box 134			
17		X	Blue Gene project at IBM Research	0108		Research Triangle Park	North Carolina	2001	box 134	tube 198		
18			Brinson residence	9603								
19			Brown/Karvazy Pavilion	9706								
20	X		Bryan, Jean residence renovation	0203		Whites Township	North Carolina	2001-2002	box 1			
21	X		Bullington, Tom residence	0102	Waterwheel Road	Hillsborough	North Carolina	2001-2003	boxes 1, 2; legal box 137	tubes 63, 299, 183, 303, 304	box 158	
22		X	Burrows, Hal residence addition		8281 Hillside Drive	Raleigh	North Carolina	1990	box 134; legal box 155		box 158	
23	X		Camp Oak Hill cabins	9916	1528 Oak Hill Road	Oxford	North Carolina	1996-2002	box 2	tubes 143, 205, 369; flat folders 8, 14		
24	X		Camp Oak Hill Fellowship Center and Activity Center	9403	1528 Oak Hill Road	Oxford	North Carolina	1994-1997	boxes 2, 3; legal box 137		box 158	

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 Series ▾
 Controlled Vocab & Formatting ▾
 Acronyms ▾
 Project Titles ▾
 Born-Digital ▾
 Blog/Hist Notes ▾

Explore



Benefits of Documentation:

Future-oriented

Additional access
for researchers

Solidifies teamwork
and communication

Sets a precedent as
a pragmatic tool



Room for Improvement

This series is arranged in alphabetical order keeping the creator's original organizational scheme with unique identifiers, when applicable.

Arrangement

This collection is divided into 8 series:

- › 01. Research Files
- › 02. Teaching and Advising Files
- › 03. School of Engineering Files
- › 04. North Carolina State University Files
- › 05. Professional Activities Files
- › 06. Sigma Xi Files
- › 07. Society of Women Engineers Files
- › 08. Personal Files

This series is arranged in alphabetical order.

This collection is divided into 3 series:

- › 01. Clinical and Research Files
- › 02. Professional Files
- › 03. College of Veterinary Medicine Files

Thank You!

Contact

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Resources

Hite, R. W. & Linke, D. J. (1990). Teaming up with technology: Team processing. *Midwestern Archivist* 15(2), 91-97.

Kesner, R. M., Karnes, S. T., Sims, A., & Shandor, M. (1981). Collection processing as a team effort. *American Archivist* 44(4), 356-358.

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Mighty Ducks flying V from <https://www.fhm.com/posts/is-the-mighty-ducks-flying-v-legal-129277>.

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